



# **CAPRI CPWM User Guide**

## **Compensation & Pension Record Interchange (CAPRI)**

### **C&P Worksheet Module (CPWM)**

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Department of Veterans Affairs  
Health Systems Design & Development (HSD&D)



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# Overview

The Veterans Health Administration and Veterans Benefits Administration have worked together for years through CPEP, the Compensation and Pension Examination Program, to improve the C&P examination process and the quality of examination reports. Compensation and Pension examinations are an integral part of the VA mission, and providing high quality, timely C&P examinations is a top priority of VHA. As part of the improvement effort, CPEP and the VHA Office of Information have collaborated to produce the CAPRI Compensation and Pension Worksheet Module (CPWM), which is a system of standardized, computer-based exam templates available for VHA-wide use in preparing exam reports.

The goal of the CAPRI CPWM project is to implement the current AMIE C&P exam worksheets in an electronic point-n-click format. The software will automatically upload exam results into VHA's VistA computer system, making the results visible to CPRS and CAPRI users alike. National use of the CPWM exam templates will help assure that established examination criteria are addressed and will provide complete and detailed exam information to support disability claims decisions.

The CAPRI application was originally implemented to expedite the VBA claims process by creating a more efficient means of requesting C&P examinations and navigating through existing patient records to fulfill the evidentiary requirements of a disability claim. It handles most administrative aspects of the examination process. Now with the addition of the Compensation and Pension Worksheet Module, CAPRI is making its official introduction into the medical center.

From this point forward the CAPRI GUI will need to be installed on the desktops of all VHA staff involved in the C&P process - from the examiner actually performing C&P examinations to the administrative clerk responsible for coordinating the exam processing. Because of its integration with TIU and CPRS, the site's Clinical Application Coordinator (CAC) will need to be familiar with the new CAPRI CPWM functionality and may also choose to have it installed as well.

# User Setup

The CAPRI GUI follows all standards for VistA applications. Users must have a valid VistA user account to access any VistA application. Additionally, in order to gain access to the CAPRI application, and more specifically the CPWM portion of CAPRI, each user will need to be assigned the VistA menu option and security keys outlined below. Functionality controlled by the assigning of the menu option and security keys is described in detail later in this document.

## ***VistA Menu Option***

All CAPRI users need the following menu option assigned as their secondary menu option or as an item on their primary menu.

**DVBA CAPRI GUI** – This is the option context to the main CAPRI application. All CAPRI users will need this menu option assigned.

## ***VistA Security Keys***

All CAPRI users that will be accessing the C&P Worksheet Module will need at least two and potentially three security keys assigned. It is important that the IRM staff coordinate with the C&P clinic to determine what keys each user should receive. The assigning of keys will affect local procedures. The majority of users will only need two new keys. The users designated to act as Reviewers will need the additional Reviewer key.

1. **DVBA CAPRI WORKSHEET TAB** – This key makes the C&P Worksheets tab visible inside CAPRI. All CAPRI users that will be involved in the processing of the C&P templates should get this key.
2. One of the following keys should be assigned to all users assigned the previous key. Before assigning the keys, it is important that the functions of these keys be understood as they allow whether or not that user has the ability to sign and complete a template. See the [Review Functionality](#) section of this guide for more details on the reviewer processes. Only ONE of these keys should be assigned due to the conflicting functionality supported by each:
  - a. **DVBAB CPWM DISALLOW REVIEW** – User does not need and can not have their examination templates reviewed prior to release. Should only be assigned at sites that will not be implementing the reviewer process. This allows the user to directly release their examination in AMIE.
  - b. **DVBAB CPWM OPTIONAL REVIEW** – User can choose to either send an examination template for review or sign and release the template themselves. This key will typically be assigned to a user who needs some, but not all, of their examinations reviewed before they're released.

- c. **DVBAB CPWM REQUIRE REVIEW** – User must have all examination templates reviewed by a reviewer prior to signing and can not release any examinations until approved by the reviewer.
3. If the site chooses to use the review process (meaning either the **OPTIONAL REVIEW** or **REQUIRE REVIEW** key has been assigned to anyone) at least one user must be designated as a Reviewer and be assigned the **DVBAB CPWM REVIEWER** key. It is expected that if the Reviewer process is implemented at a site, that multiple people will be assigned this key to cover for cases where the primary reviewer is unavailable.

**Example of Key Assignments:**

A nurse practitioner at a site that will be implementing the template review process would potentially be assigned the following two security keys:

- DVBA CAPRI WORKSHEET TAB
- DVBAB CPWM REQUIRE REVIEW

The keys assigned to the NP give him/her the ability to access and create a new template, but they can not sign and complete the template until it has been “approved” by someone designated as a Reviewer.

A supervising physician at that same site would receive the following three keys:

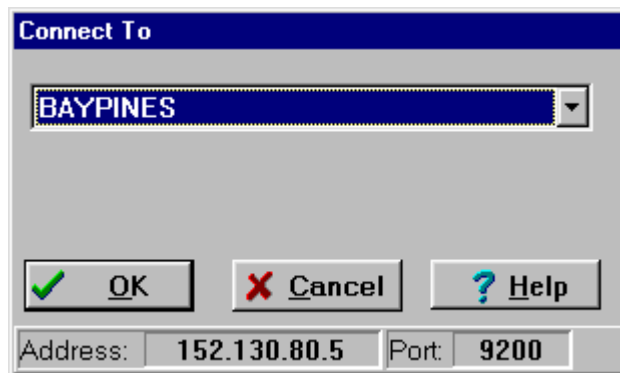
- DVBA CAPRI WORKSHEET TAB
- DVBAB CPWM OPTIONAL REVIEW
- DVBAB CPWM REVIEWER.

The keys assigned to the physician allow him/her to access, create, and complete templates with or without the interaction of other users. Additionally, the physician will have the ability to review the templates created by the NP.

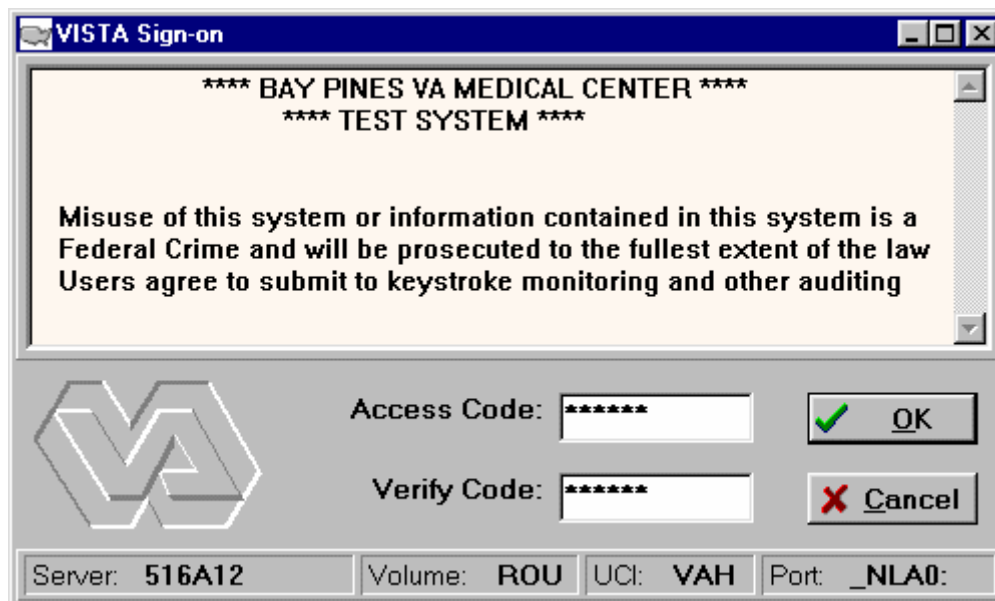
# Logging On to CAPRI

Successful access to CAPRI requires that the User has been properly set up as outlined in the [User Setup](#) section of this document.

Step 1 - Double click the CAPRI icon from your desktop.



Step 2 –Select the name of the VHA facility you wish to connect to (if you have access to more than one VHA facility), click to select it, and click the *OK* button.

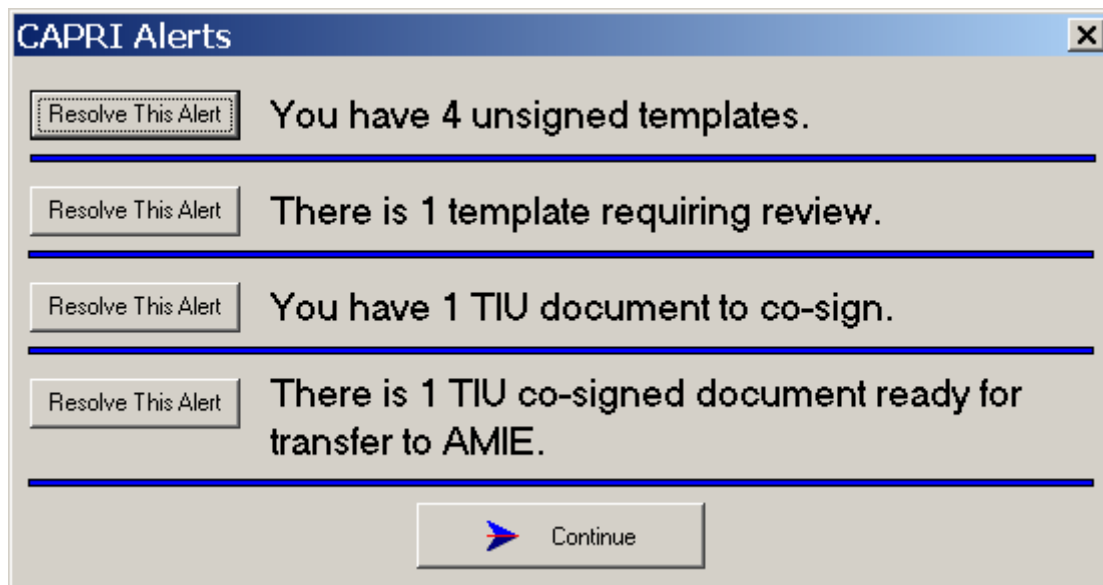


Step 3 - Fill in your VistA Access and Verify Codes and press Enter or click the *OK* button. (Please note the access and verify codes are the same as you use for any VistA application.)



# CAPRI Alerts

After a successful logon, templates in a DRAFT, PENDING REVIEW, AWAITING SIGNATURE, or AWAITING COSIGNATURE status will trigger the following alert dialog (actual alerts displayed will depend on the type of user and the actions pending for the existing templates). You may optionally choose to address any of these alerts at this time or choose to continue on to a CAPRI session. The items contained in the alerts dialog can also be resolved using options on the CAPRI menu bar once the user has entered the application.



## ***Unsigned Templates Notification***

If you have unsigned templates, templates you have authored for any patient but not yet signed or templates that have been sent back from a reviewer, you will be given the opportunity to access those exams. See the [Unsigned Templates](#) section of this guide for more details on the Unsigned C&P Worksheets utility.

## ***Templates Requiring Review Notification***

If you have been assigned reviewer privileges and there are templates in a Pending Review status you will be given the opportunity to access those exams. See the [Review Functionality](#) section of this guide for more details on the reviewer processes.

### ***Templates Requiring Cosignature Notification***

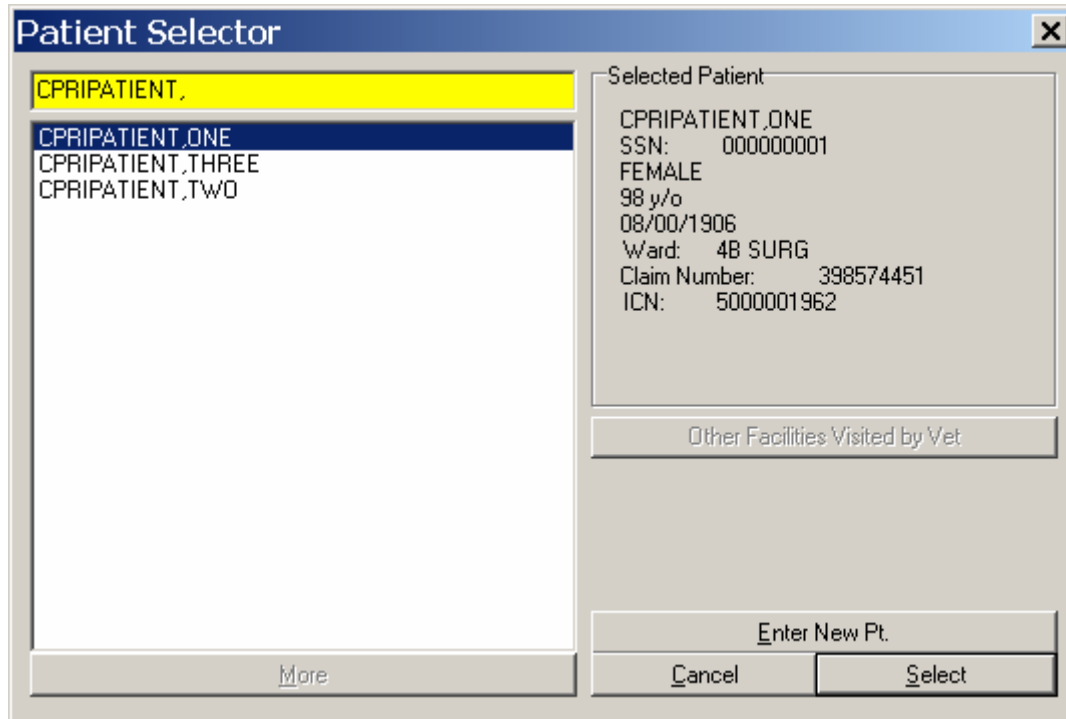
If you have been set up in CPRS as a cosigner and there are templates that require your cosignature, you will be given the opportunity to access the cosignature utility and co-sign those exams (please note that you will only be able to cosign C&P examinations from within CAPRI; other TIU document types will need to be resolved in CPRS). See the [Uncosigned Templates](#) section of this guide for more details on the Uncosigned TIU Documents utility.

### ***Cosigned Templates Ready for Transfer to AMIE Notification***

If there are any templates that have been co-signed in the CPRS application instead of the CAPRI application, you will be given the opportunity to access the cosignature transfer utility to bring the cosignature over to the template in CAPRI (please note that in cases where this alert is received, these exams can not be released to the VARO until the CPRS cosignature has been transferred to the CAPRI template). See the [Templates Cosigned in CPRS](#) section of this guide for more details on the CPRS C&P Cosignature Transfer utility.

# Patient Selection

The first screen displayed after the Alert dialog will be the Patient Selector dialog.



Select the patient by one of the following search methods.

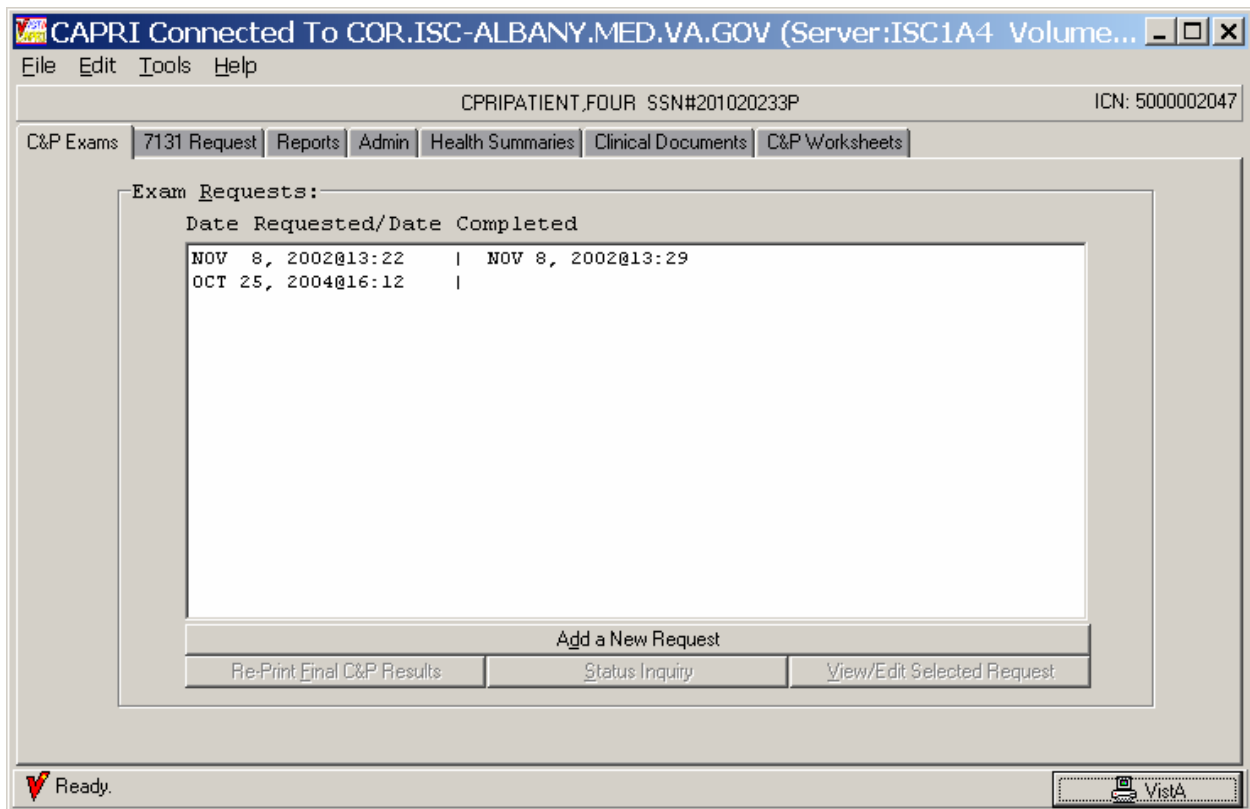
- Type in the patient's social security number.
- Type in the last name initial and last four of the SSN.
- Type in a portion or all of the patient's "last name,first name".

A list of possible matches will be displayed according to the search criteria entered. A single click on the patient's name will display the patient data under the Selected Patient heading located on the right side of the patient selector window. The first match on the list will be automatically displayed. After you have verified that you have selected the correct patient, click the *Select* button to begin a CAPRI session for the patient.

You may switch to a different patient at any time by choosing File or 'Alt-F' then 'Select Patient' to access the patient selector screen again.

## C&P Exams Tab

After selecting a patient you will be presented with the standard CAPRI display. A series of tabs will be laid out across the top of the screen under the patient's name. The first tab, C&P Exams, is a list of C&P examination requests that have been entered into the system for the selected patient.



If you wish to view an exam request, click on the desired request and then click the *View/Edit Selected Request* button. Within the exam request you may view comments or notes included by the requestor, and you may also view a list of the different exams requested. You may also add additional exams to an open request.

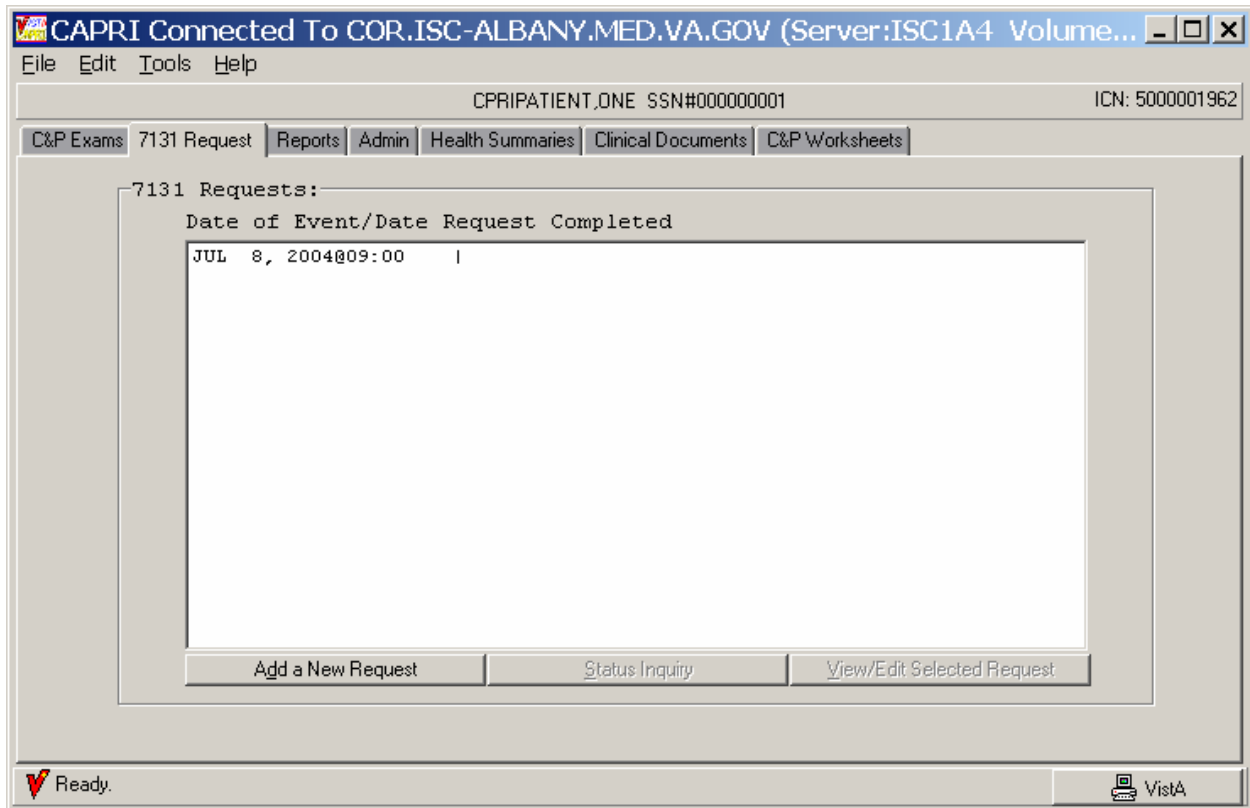
### ***Add Exam to Existing Request***

The screenshot shows a software window titled "View C&P Exam". At the top is a menu bar with "Edit". Below the menu bar is a large text input field. Underneath this field are three rows, each labeled "Other Disabilities [1]:", "[2]:", and "[3]:", each followed by a text input field. Below these is a section labeled "Exams Requested:" followed by a list box. The list box contains three items: "DIABETES MELLITUS [OPEN]", "ESOPHAGUS AND HIATAL HERNIA [OPEN]", and "FEET [OPEN]". Below the list box is a row of three buttons: "Cancel ALL Exams", "View Selected Exam", and "Add Exam to Request". At the bottom of the window is a footer area containing two date input fields labeled "Date Reported to MAS:" and "Date Scheduling Completed:". Below these fields are two more buttons: "Add An Insufficient Exam Request" and "Close Window".

To add an exam to the request, select the Add Exam to Request button. You will be presented with a list of C&P Exam types. Select the exams you would like to add and they will be included in the Exams Requested list.

## 7131 Request Tab

7131 requests are reserved for information that Raters cannot obtain such as older records and retired records that may not exist in the electronic database.



7131 Request tab (mainly intended for VBA use) includes functions such as:

- Adding new requests
- Status inquiries and reports
- Viewing and editing pending requests
- Pending requests are shown in the left column and completed requests are shown in the right column of the screen

The Reports tab allows you to make various patient inquiries, review registration and profile data, and request surgery reports, for the selected veteran.

The screenshot displays the CAPRI software interface. At the top, a title bar reads "CAPRI Connected To COR.ISC-ALBANY.MED.VA.GOV (Server:ISC1A4 Volume...)". Below this is a menu bar with "File", "Edit", "Tools", and "Help". A status bar at the top shows "CPRIPATIENT.ONE SSN#000000001" and "ICN: 5000001962".

The main window has a tabbed interface with the following tabs: "C&P Exams", "7131 Request", "Reports", "Admin", "Health Summaries", "Clinical Documents", and "C&P Worksheets". The "Pt. Inquiry" tab is selected, showing a sidebar menu with options: "Detailed Inpt. Inquiry", "C&P Exam Detail", "7131 Detail", "Additional Treating Facilities", "View Registration Data", "Patient Profile MAS (Full)", and "Surgery Report".

The main content area displays patient information for "CPRIPATIENT.ONE". The data is organized as follows:

- Header:** CPRIPATIENT.ONE 000-00-0001 AUG 1906
- Separator:** =====
- Section:** COORDINATING MASTER OF RECORD: ALBANY.VA.GOV
- Address:** 000 TEST PATIENT ADDRESS Temporary: NO TEMPORARY ADDRESS  
HOMER,AK 99603
- County:** KENAI PENINSULA (122) From/To: NOT APPLICABLE
- Phone:** 999-555-0101 Phone: NOT APPLICABLE
- Office:** UNSPECIFIED
- Bad Addr:**
- Confidential Address:** NO CONFIDENTIAL ADDRESS Confidential Address Categories:
- From/To:** NOT APPLICABLE
- POS:** AIR FORCE--ACTIVE DUTY Claim #: 398574451
- Relig:** OTHER Sex: FEMALE
- Race:** AMERICAN INDIAN OR ALASKA Ethnicity: HISPANIC OR LATINO  
NATIVE, ASIAN, BLACK OR  
AFRICAN AMERICAN, NATIVE  
HAWAIIAN OR OTHER PACIFIC  
ISLANDER, WHITE
- Primary Eligibility:** SERVICE CONNECTED 50% to 100% (VERIFIED)

The bottom of the window shows a "Ready." status bar and a "Vista" logo.

## Admin Tab

The Admin tab includes address and appointment information. The address tab contains patient address information. Users can view or edit the permanent address data or view the temporary address. The appointments tab contains Past, Future, and all appointment data as well as admissions data.

The screenshot displays the CAPRI software interface. The title bar reads "CAPRI Connected To COR.ISC-ALBANY.MED.VA.GOV (Server:ISC1A3 Volume...)". The menu bar includes "File", "Edit", "Tools", and "Help". The status bar at the top shows "CPRIPATIENT.ONE SSN#000000001" and "ICN: 5000001962". The main menu includes "C&P Exams", "7131 Request", "Reports", "Admin", "Health Summaries", "Clinical Documents", and "C&P Worksheets". The "Admin" tab is selected, showing a form for patient address information. The form fields are: Address (000 TEST PATIENT ADDRESS), City (HOMER), State (ALASKA), Zip+4 (99603), County (KENAI PENINSULA 122), Phone (999-555-0101), and Office Phone. Below the form are buttons for "Edit Address Information", "Reload from Vista", and "Save Changes". A section titled "Temporary Address Info:" is visible. At the bottom, there are tabs for "Address" and "Appointments". The Windows taskbar at the bottom shows "Ready." and "Vista".

Address: 000 TEST PATIENT ADDRESS

City: HOMER

State: ALASKA

Zip+4: 99603

County: KENAI PENINSULA 122

Phone: 999-555-0101

Office Phone:

Edit Address Information Reload from Vista Save Changes

Temporary Address Info:

Address Appointments

Ready. Vista



## Health Summaries Tab

The Health Summaries Tab allows access to and ability to generate pre-defined custom reports based upon the needs of user groups. These reports are sourced from components in the Ad Hoc Health Summary of the VistA system. The left hand column shows all the various programmed Health Summaries available. This menu will vary from facility to facility and will be the same list of health summary choices as in CPRS. Use the scroll bar to find the specific health summary you want to view.

11/08/2004 21:58

\*\*\*\*\* CONFIDENTIAL AD HOC SUMMARY pg. 1 \*\*\*\*\*

CPRIPATIENT.ONE 000-00-0001 4B SURG DOB: 08/00/1906

----- BDEM - Brief Demographics -----

Address: 000 TEST PATIENT ADDRESS Phone: 999-555-0101  
HOMER, ALASKA

Eligibility: SERVICE CONNECTED 50% to 100% Age: 98  
Means Test: NO LONGER REQUIRED Sex: FEMALE

Ethnicity: HISPANIC OR LATINO  
Race: AMERICAN INDIAN OR ALASKA NATIVE  
ASIAN  
BLACK OR AFRICAN AMERICAN  
NATIVE HAWAIIAN OR OTHER PACIFIC ISL  
WHITE

\*\*\* END \*\*\*\*\* CONFIDENTIAL AD HOC SUMMARY pg. 1 \*\*\*\*\*

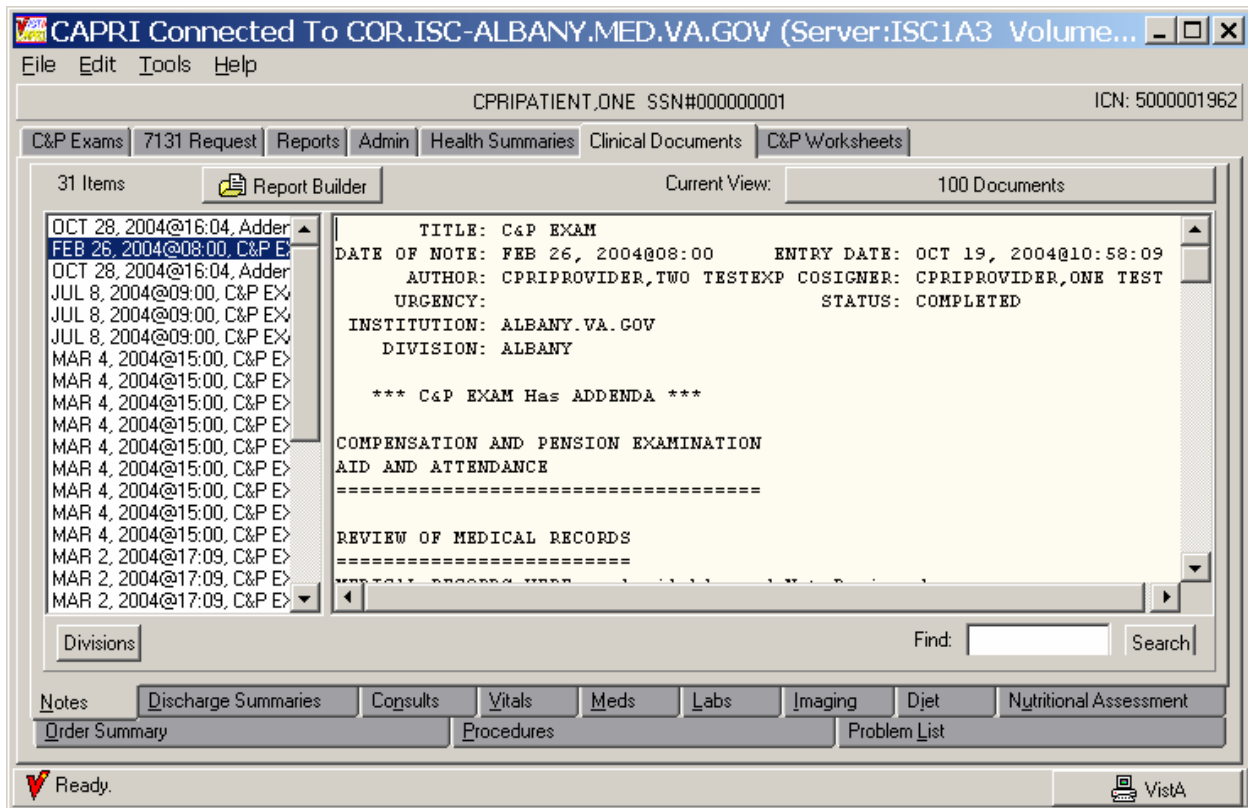
Local Remote Data View

Adhoc Report

Ready. Vista

## Clinical Documents Tab

The clinical documents tab opens another set of tabs along the bottom of the screen which allow navigation within various components of the veteran's electronic medical records. This screen is essentially a read-only view of the same data available in CPRS. Clicking on the Clinical Documents tab allows access to: Notes (progress notes), Discharge Summaries, Consults, Vitals, Medications, Laboratory findings, Imaging (x-rays, CT, MRI, etc.), Dietary restrictions, Nutritional Assessments, Physician's Orders Summary, Procedures (Holter monitor, echocardiogram, electrocardiogram, thallium stress test, etc.), and Problem List.



## C&P Worksheets Tab

The C&P Worksheets tab will display a list of templates previously generated for the selected patient. The display will include the Template Name, Date Signed (if status is complete), Author, and Template Status.

The screenshot shows a web application window titled "CAPRI Connected To COR.ISC-ALBANY.MED.VA.GOV (Server:ISC1A4 Volume...)". The interface includes a menu bar (File, Edit, Tools, Help) and a patient information bar (CPRIPATIENT, ONE SSN#0000000001, ICN: 5000001962). The "C&P Worksheets" tab is selected, displaying a table of templates. The table has columns for Template Name, Date Signed, Author, and Status. The templates listed are:

Template Name	Date Signed	Author	Status
MUSCLES		CPRIPROVIDER, THREE	REVIEW PENDING
MERGED FORMS - LISTED BELOW:		CPRIPROVIDER, ONE T	DRAFT/NOT READY
FEET			
GENERAL MEDICAL EXAMINATION			
SCARS		CPRIPROVIDER, ONE T	DRAFT/NOT READY
AID AND ATTENDANCE OR HOUSEBOU	OCT 19, 2004@10:58	CPRIPROVIDER, TWO T	COMPLETE

Below the table are buttons for "Display Template", "Delete Template", and "Refresh List". At the bottom, there are buttons for "New Template" and "Unsigned Templates". The status bar at the bottom indicates "Ready." and "Vista".

Statuses include the following:

- Draft/Not Ready – template has been started but not completed.
- Review Pending – template has been sent for review.
- Sent Back – template has been sent back to the clinician by the reviewer for changes.
- Uncosigned – template has been signed by the author but requires a cosignature.
- Awaiting Signature – template has been sent to the clinician for signature by the reviewer.
- Complete – template has been signed and completed on the date shown.

## **C&P Worksheets Tab Functions**

### **Display Template**

You may reopen an existing template in the C&P Worksheet tab display by selecting it and clicking on the *Display Template* button or by double-clicking. All templates in a complete status will be viewable, but you will only be able to view your own unsigned templates unless you are a reviewer or hold the “@” Fileman security key.

### **Delete Template**

You may delete any existing template in the C&P Worksheet tab display that is not in a Completed status by selecting it and clicking on the *Delete Template* button. You will only be able to delete your own templates unless you are a reviewer or hold the “@” Fileman security key.

### **Refresh List**

You may update the C&P Worksheet tab display for the selected patient by clicking on the *Refresh List* button. The refresh function will normally happen automatically, as needed, but may be manually selected as well.

### **New Template**

If you have been assigned the Disallow Review, Optional Review, or Require Review key as described in the [User Setup](#) section of this document, you may create a new template by clicking on the *New Template* button. The Browse Templates screen will appear with a list of the templates available for selection on your VistA system. Refer to the next page for details on starting a new template.

## Template Selection

**Browse Templates:**

Select the desired examination protocol(s) from the list of available templates and click the [add this template] button. Once all selections have been made, click [generate template] to build the customized worksheet.

Available Templates:

- EYE EXAMINATION
- FEET
- GENERAL MEDICAL EXAMINATION
- GENITOURINARY EXAMINATION
- GYNECOLOGICAL CONDITIONS AND DISORDERS OF THE BREAST
- HAND, THUMB, AND FINGERS
- HEART

Add this template

Selected Templates:

- ARRHYTHMIAS
- ARTERIES, VEINS AND MISCELLANEOUS

Don't use selected template

Description:

Last updated on 12/07/2004

Cancel      Used Buffer Space: 18%      Generate Template

Select the desired template from the list of available templates and either double click or select the *Add this template* button. The highlighted template will then move down to the Selected Templates box. You may select a single template or multiple templates. As you select the templates, the system will calculate the amount of buffer space that will be required based on the size of each template. If the buffer space is filled over capacity, you will not be allowed to select any additional templates. To remove a selection from the Selected Templates box, either double click on the exam name you wish to remove, or select and click the *Don't use selected template* button. Each time a template is selected the date and version will show in the Description box. This information is only needed to resolve potential issues.

### *Generate Template*

Once you have selected the desired template(s), click the *Generate Template* button. After selecting the *Generate Template* button, the system will potentially take a minute or two to initialize and load the selected template(s). The larger percentage displayed in the Used Buffer Space display, the longer it will take to load.

# Completing a Template

**MERGED FORM**

Author: **CPRPROVIDER.ONE.TEST** Patient: **CPRPATIENT.THREE** Date Updated: **NOV 05, 2004@14:06:33**  
 Transcriber: SSN: **000000003**

History | Physical Exam | Tests | Diagnosis | Medical Opinion

JOINTS | **Spine**

**Records Review**

- Build Problem List**
- Document Problems**
- Review Problem Summary**

History of Trauma to the spine?  
☒ Yes ☐ No **Re-open**

History of hospitalization or surgery?  
☒ Yes ☐ No **Re-open**

History of Neoplasm?  
☐ Yes ☒ No

**Review of Systems**

Fatigue: **None**

Decreased Motion: **Mild**

Stiffness: **Mild**

Location: **low back**

Weakness: **None**

Location: **low back**

Spasm: **Mild**

Location: **low back**

Pain: ☒ Yes ☐ No **Re-open**

**Devices/Aids**

**None**

Corrective Shoes  
 Orthotic Insert  
 1 Cane  
 2 Canes  
 Brace  
 1 Crutch  
 2 Crutches  
 Walker

**Limitations on Walking**  
**Able to walk 1-3 miles**

Is this an examination for intervertebral disc syndrome (IVDS)?  
☒ Yes ☐ No **Re-open**

**Current Weight**  
**187**

**Recent Weight Change** **Pounds**  
**None**

Over past **weeks**  
 Over past **months**  
 Over past **years**

**Close** **Preview** **Save** **?** **Send for Signature** **Send for Review** **Done!**

Enter data on each template by clicking on the tabs and completing the fields, as appropriate for the exam being performed. Questions will be specific to the selected exam template. If two or more templates have been merged, use the buttons labeled with the Exam Type and located immediately below the tabs to navigate across templates. Answers to questions that exist on more than one of the merged templates will carry across to the other templates, eliminating the need to answer a single question multiple times. These duplicate or identical questions will be highlighted within the template to signify the answer is being carried over to the other merged template(s). If one of the duplicate/identical questions requires additional entries (such as a popup dialog) on a different exam type, these will be presented automatically the next time you switch to that exam type (i.e. change from Spine to Joints in the example above).

## **Template Functions**

Across the bottom of the template window a series of buttons that control the processing of the template are available dependent on the security keys assigned to the user.

### **Close**

If you are unable to complete the entire template(s) and wish to resume at a later time, you may use the *Close* button to save your work and return to the C&P Worksheets tab.

### **Preview**

To review what you have entered click the *Preview* button. A screen will be displayed showing all the data that has been entered on the template. This represents what the final document will look like when stored in the TIU and AMIE packages. You will also be given the opportunity to print the examination report from within the Preview window.

### **Save**

You may use the *Save* button at any time to save the data you have entered to the Vista database. Please note that an Autosave function will also kick off every 8 minutes.

### **“?”**

To view the version of the template that you are working with, you may use the question mark (?) button. This is particularly useful when troubleshooting potential defects in the template.

### **Send for Signature**

Users assigned the DVBAB CPWM REVIEWER key will have the ability to send the exam to another user of their choosing for signature by clicking the *Send for Signature* button. The template status of these exams will change to Awaiting Signature. Normally, the original author should be chosen when sending for signature.

### **Send for Review**

Users assigned the DVBAB CPWM REQUIRE REVIEW key will only be able to send their templates for Review. By clicking on the *Send for Review* button the template status would change to Pending Review and the Reviewer type users would receive an alert. For further information on the review process see the [Review Functionality](#) section of this document.

## Review Events

Reviewers will have the ability to send a document back to the author for edits by clicking the *Review Events* button. For more information please see the [Review Functionality](#) section of this document.

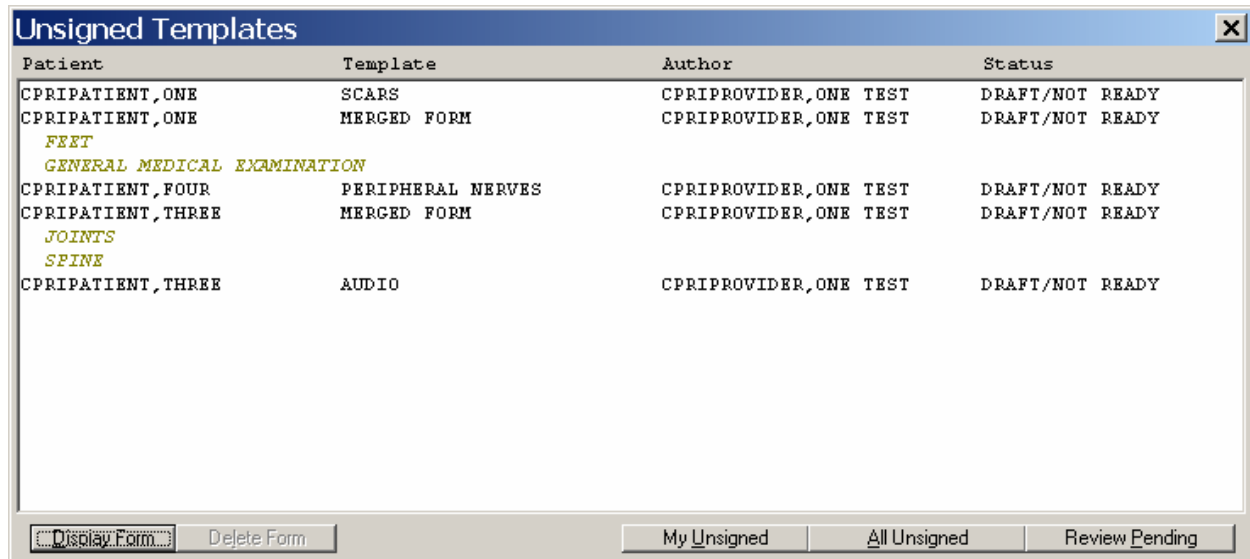
## Done

Clicking the *Done* button will display the final report and initiate the signature process. The report is un-editable as all changes must occur from within the template. For more information on the signature process please refer to the [Signature Process](#) section of this document.



# Unsigned Templates

There are several ways to access the Unsigned Templates utility. You may either access through the Resolve Alert feature at login, through the *Unsigned Templates* button at the bottom of the C&P Worksheets tab display, or through the *My Unsigned C&P Worksheets* option in the Tools drop down menu. Opening templates from this window acts the same as opening templates from the main C&P Worksheets tab display.



Patient	Template	Author	Status
CPRIPATIENT,ONE	SCARS	CPRIPROVIDER,ONE TEST	DRAFT/NOT READY
CPRIPATIENT,ONE	MERGED FORM	CPRIPROVIDER,ONE TEST	DRAFT/NOT READY
FEET			
GENERAL MEDICAL EXAMINATION			
CPRIPATIENT,FOUR	PERIPHERAL NERVES	CPRIPROVIDER,ONE TEST	DRAFT/NOT READY
CPRIPATIENT,THREE	MERGED FORM	CPRIPROVIDER,ONE TEST	DRAFT/NOT READY
JOINTS			
SPINE			
CPRIPATIENT,THREE	AUDIO	CPRIPROVIDER,ONE TEST	DRAFT/NOT READY

Buttons at the bottom: Display Form, Delete Form, My Unsigned, All Unsigned, Review Pending

The default display for this window is a list of templates that you have started but have not signed. You can change the display with the various buttons across the bottom of the window.

- Clicking the *My Unsigned* button will change the display back to **your** unsigned templates.
- Clicking the *All Unsigned* button will list **all** unsigned templates for **all** users.
- Clicking the *Review Pending* button will list all templates that have been sent for review and have not been acted on (only users who hold the DVBAB CPWM REVIEWER key have access to documents waiting for review).

## Review Functionality

Security keys control the way CAPRI functions for a specific user. These are summarized in the [User Setup](#) section of this document. Depending on which keys a user is given, they may be forced to send their work to a reviewer, not allowed to send to a reviewer at all, or allowed to optionally send to a reviewer. The displays below demonstrate what users will see at the bottom of their template screen when assigned the different keys.

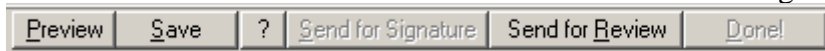
DVBAB CPWM DISALLOW REVIEW – The user does not need to send templates for review and will be prevented from doing so. This may be useful if there is only one C&P provider or there is no review process established at the site. Note that the *Send for Review* button has been grayed out and cannot be selected.



DVBAB CPWM OPTIONAL REVIEW – The user can choose whether to send a template for review or not. Note that both the *Send for Review* and *Done* buttons are active.



DVBAB CPWM REQUIRE REVIEW – All of the user's templates require a review prior to going into AMIE and TIU. Note that the *Done* button is grayed out. It will become active once the reviewer sends the document back to the user for final signature.



### Role of the REVIEWER

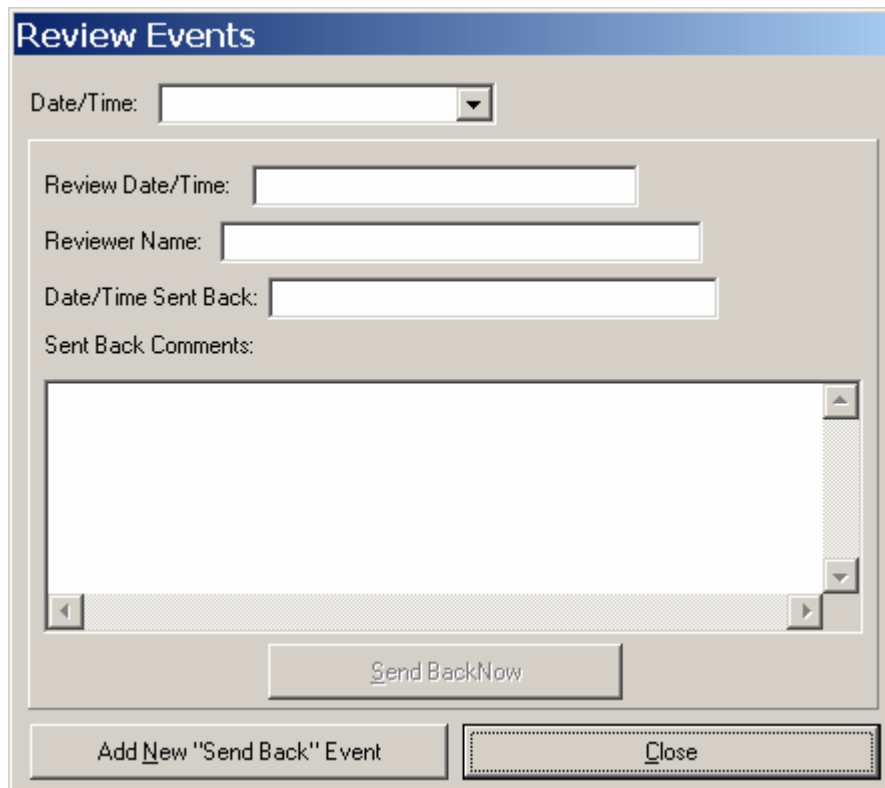
Users who are assigned to perform the role of a reviewer will be alerted when logging into CAPRI if any templates are in a Review Pending status. See the [CAPRI Alerts](#) section in this document for more information on the Alert functionality.

When a Reviewer opens a template, the buttons at the bottom of their template screen will appear slightly different as seen in the display below. Note the *Send for Review* button has been replaced with a *Review Events* button.



If a Reviewer finds no problems with a template, they can either send the template to a specified user for signature by clicking the *Send for Signature* button, or they can sign the template themselves by clicking the *Done* button. If they sign the template themselves, their signature will appear at the bottom of the final report along with a notation describing who originally authored the template.

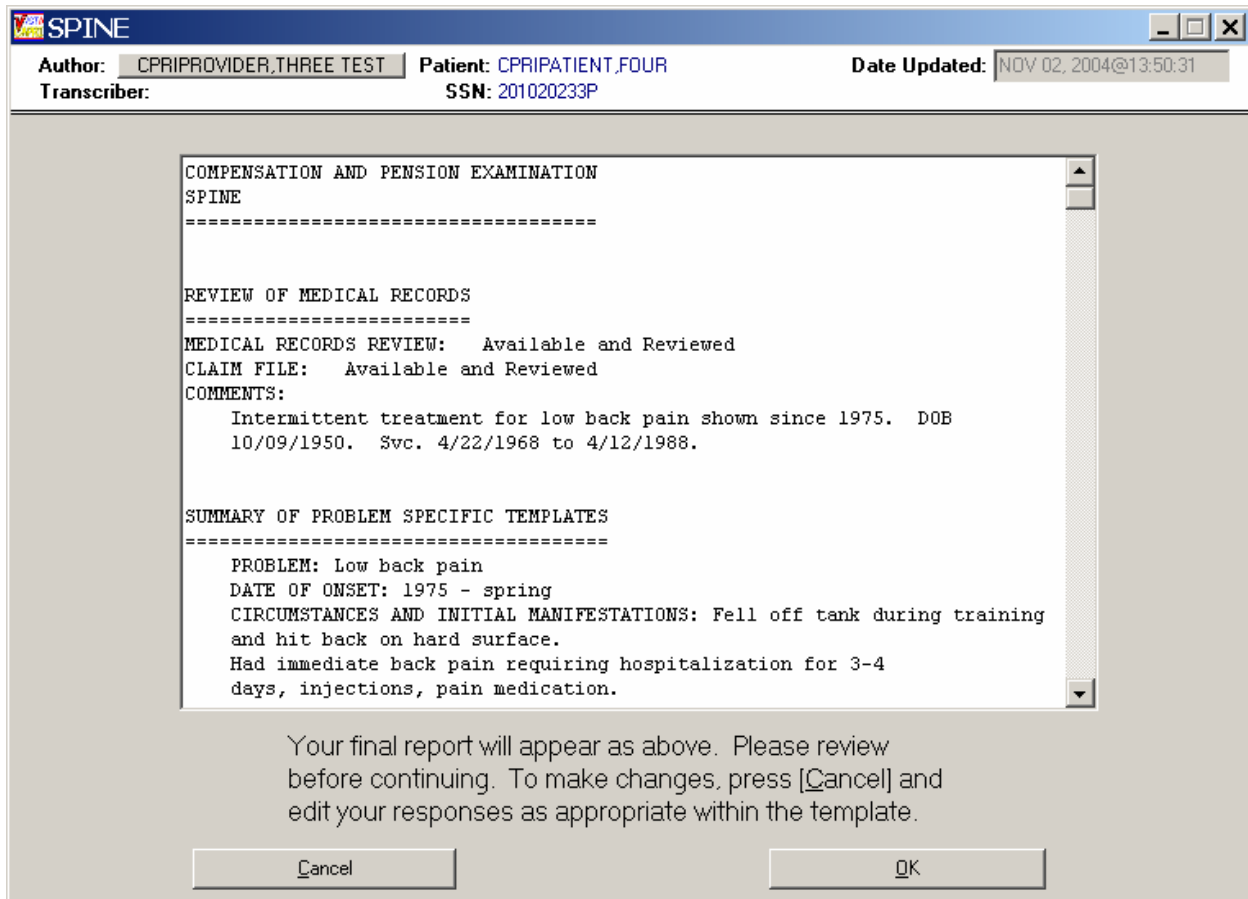
If a problem is found with the template a Reviewer can either edit the template and make the corrections themselves or click the *Review Events* button which will initiate the Review Events dialog box displayed below and ultimately send the template back to the author for rework.

The image shows a software dialog box titled "Review Events". At the top, there is a "Date/Time:" label followed by a dropdown menu. Below this, there are three text input fields: "Review Date/Time:", "Reviewer Name:", and "Date/Time Sent Back:". Under the "Date/Time Sent Back:" field is a label "Sent Back Comments:" followed by a large, empty text area with a vertical scrollbar on the right and horizontal scrollbars at the top and bottom. Below the text area is a button labeled "Send Back Now". At the bottom of the dialog box are two buttons: "Add New 'Send Back' Event" on the left and "Close" on the right, which is enclosed in a dashed rectangular border.

The reviewer can browse previous Review Events activity on the template by selecting entries under the “Date/Time” field, if there are any. To create a new review event, the reviewer will click the *Add New Send Back Event* button. The top 3 fields will be set automatically. The reviewer will place any communication to the author in the “Sent Back Comments” field. Once completed, by clicking the *Send Back Now* button, the status of the template will be changed to “Sent Back” and the original author will receive a notice the next time they log into CAPRI. The reviewer’s comments will be the first thing seen when the template is opened by the original author. Once the author has made the suggested modifications, they can send the document back to the reviewer and the process can continue repeating until the reviewer is satisfied that the document is ready to be signed

## Signature process

When a template is ready for signature, click the *Done* button. You will be presented with a preview of the final exam report as it will appear in TIU and AMIE. This report is just a text document built from data provided in the template and is un-editable. If you need to make any changes click the *Cancel* button to return to the template.



**SPINE**

Author: CPRIPROVIDER,THREE TEST Patient: CPRIPATIENT,FOUR Date Updated: NOV 02, 2004@13:50:31  
Transcriber: SSN: 201020233P

COMPENSATION AND PENSION EXAMINATION  
SPINE  
=====

REVIEW OF MEDICAL RECORDS  
=====

MEDICAL RECORDS REVIEW: Available and Reviewed  
CLAIM FILE: Available and Reviewed  
COMMENTS:  
Intermittent treatment for low back pain shown since 1975. DOB  
10/09/1950. Svc. 4/22/1968 to 4/12/1988.

SUMMARY OF PROBLEM SPECIFIC TEMPLATES  
=====

PROBLEM: Low back pain  
DATE OF ONSET: 1975 - spring  
CIRCUMSTANCES AND INITIAL MANIFESTATIONS: Fell off tank during training  
and hit back on hard surface.  
Had immediate back pain requiring hospitalization for 3-4  
days, injections, pain medication.

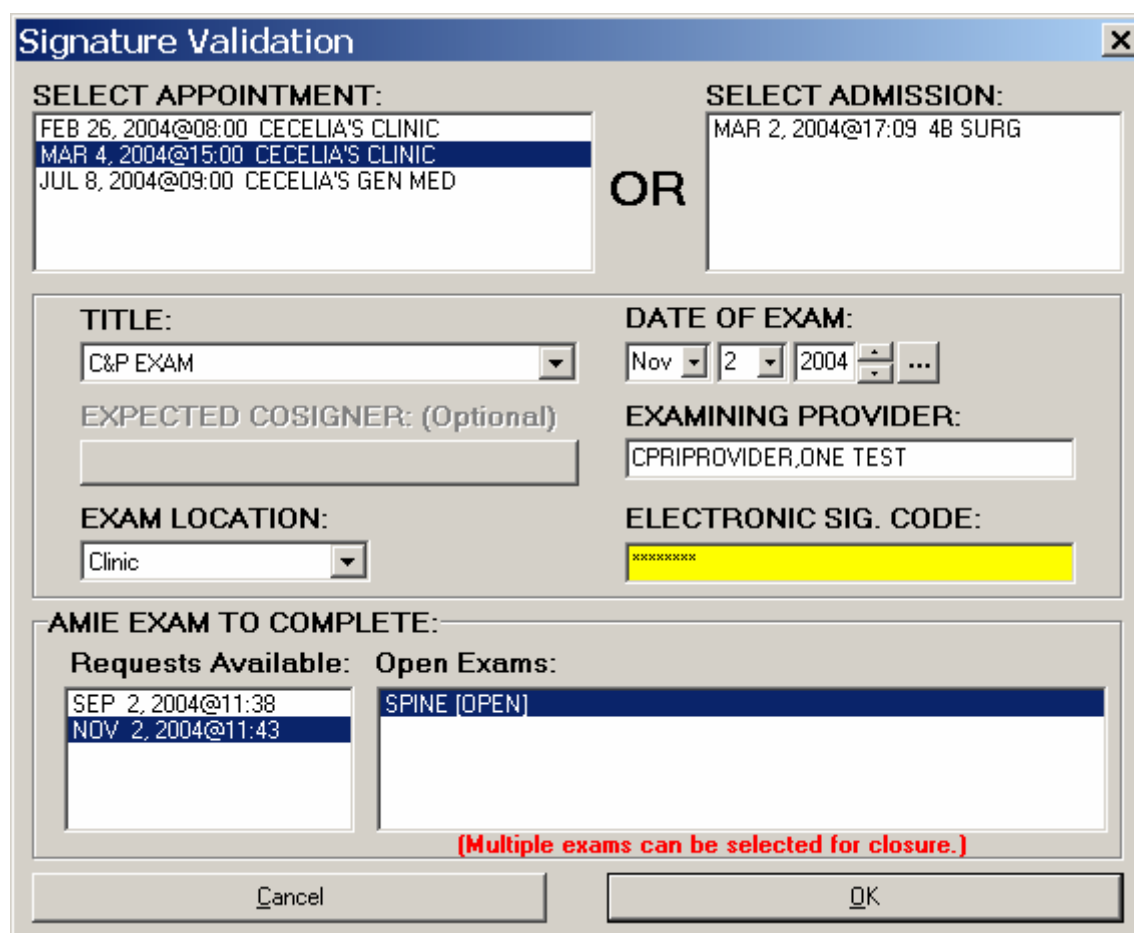
Your final report will appear as above. Please review  
before continuing. To make changes, press [Cancel] and  
edit your responses as appropriate within the template.

Cancel OK

If no changes are necessary, click the *OK* button to proceed to the Signature screen.

## Signature Validation Screen

This screen is a combination of TIU and AMIE fields that are required to create a document and release it in AMIE. Select the appointment date that corresponds with the C&P exam date. If the exam is being done while the patient is an inpatient, select the correct admission. Once a date is selected, the remainder of the fields will appear. To complete this screen, you must answer all fields and enter your electronic signature code. Select the correct AMIE exam request under "Requests Available". A list of the open exams for that request will be displayed. If you are working with merged templates, you will need to select **ALL** the corresponding exams for closure. This is the only process that actually links the completed templates to the exam request. Click the **OK** button to complete the process. If multiple exams have been selected for closure, only the first one will receive a copy of the exam report. The others will contain a statement referring the user back to the first examination. The exam report will also appear in CPRS along with the patient's other TIU documents.



The dialog box is titled "Signature Validation" and contains the following fields and sections:

- SELECT APPOINTMENT:** A list box with three items: "FEB 26, 2004@08:00 CECELIA'S CLINIC", "MAR 4, 2004@15:00 CECELIA'S CLINIC" (highlighted), and "JUL 8, 2004@09:00 CECELIA'S GEN MED".
- SELECT ADMISSION:** A list box with one item: "MAR 2, 2004@17:09 4B SURG".
- OR**: A large text label between the two selection boxes.
- TITLE:** A dropdown menu with "C&P EXAM" selected.
- DATE OF EXAM:** A date picker showing "Nov 2 2004".
- EXPECTED COSIGNER: (Optional):** An empty text field.
- EXAMINING PROVIDER:** A text field containing "CPRIPROVIDER.ONE TEST".
- EXAM LOCATION:** A dropdown menu with "Clinic" selected.
- ELECTRONIC SIG. CODE:** A yellow text field containing "XXXXXXXX".
- AMIE EXAM TO COMPLETE:** A section with two sub-sections:
  - Requests Available:** A list box with two items: "SEP 2, 2004@11:38" and "NOV 2, 2004@11:43" (highlighted).
  - Open Exams:** A list box with one item: "SPINE [OPEN]" (highlighted).
- (Multiple exams can be selected for closure.)**: A red text label below the "Open Exams" list box.
- Buttons:** "Cancel" and "OK" buttons at the bottom.

## ***Signature Screen Functionality***

### **TITLE Selection**

Because CAPRI CWPM stores templates in TIU, it's necessary that your Clinical Application Coordinator (CAC) or TIU support staff verify the existence of appropriate note titles for C&P documents. CAPRI will search for and display only titles that appear to be appropriate C&P titles. If no C&P titles are found, all titles will be allowed for selection. It is recommended that there be at least a standard "C&P EXAM" title. Any error messages received concerning inability to sign a particular title should be referred to the site's CAC for resolution.

### **Cosignature Functionality**

If a user, such as a NP, has been set up to require a co-signature, the EXPECTED COSIGNER box will be activated and all other AMIE specific fields required to release the exam, other than the electronic signature code, will be hidden. Please note that the selected TITLE must be properly set up by IRM or the Clinical Application Coordinator in order for the cosignature logic to initiate. CAPRI will respect the same settings as CPRS/TIU when activating this functionality.

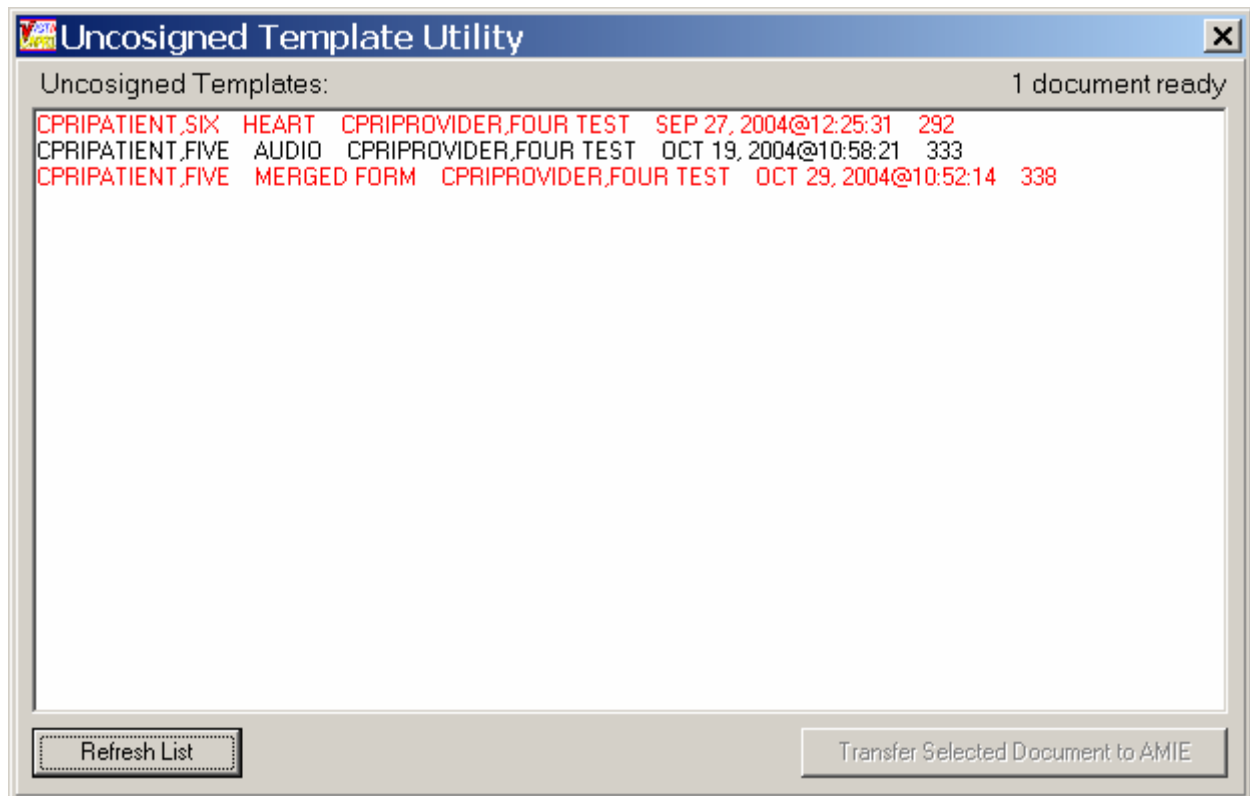
After selecting a cosigner, entering the electronic signature code, and clicking the *Ok* button, the status of the template will be set to UNCOSIGNED in CAPRI and it will also transfer to CPRS/TIU with a status of UNCOSIGNED. Please note that the exam is not stored in AMIE at this point.

### **Expected Cosigner Actions**

The cosigner has two avenues to go about signing the exam. They may cosign the copy of the exam stored in CPRS, necessitating the need to utilize CAPRI's cosignature transfer utility to also transfer the signature to the CAPRI CWPM template (see the [Templates Cosigned in CPRS](#) section), or they may cosign the template directly in CAPRI alleviating the need for any further steps (see the [Uncosigned Templates](#) section). It is highly recommended to co-sign C&P templates directly in CAPRI to obviate the need for the extra step.

## Templates Cosigned in CPRS

Templates that have been cosigned in CPRS require an extra step to transfer the cosignature to the copy of the exam template stored in CAPRI before the exam can be released. If users will utilize the cosigning functionality provided in CAPRI, then this transfer utility will never need to be used.



The “CPRS C&P Cosignature Transfer Utility” can be accessed either through the Alert Resolution window at logon or through the drop down menu under Tools in the CAPRI menu bar. This utility will scan through TIU to find all C&P templates that have been signed in CPRS that remain in an Unsigned status in CAPRI. To transfer the signatures over to CAPRI, select the exam and click on the *Transfer Selected Document to AMIE* button. Only documents in black may be transferred. Documents in red have not yet been co-signed in CPRS.

# Uncosigned Templates

Templates that are in an Uncosigned status may be cosigned directly in CAPRI utilizing the “My Uncosigned TIU Documents Utility”.

**TIU Co-Signature Alert Resolution**

Alerts:

TEST\_AAAA (T6123) 2004/10/29@10:55 UNCOSIGNED C&P EXAM available for COSIGNATURE.

If there are non-C&P documents in this list that require co-signature, please co-sign them directly in CPRS.

Document View:

TITLE: C&P EXAM  
DATE OF NOTE: MAY 20, 2003@10:00      ENTRY DATE: OCT 29, 2004@10:55:34  
AUTHOR: CPRIPROVIDER, FOUR TESEXP      COSIGNER: CPRIPROVIDER, ONE TEST  
URGENCY:      STATUS: UNCOSIGNED

COMPENSATION AND PENSION EXAMINATION  
DIABETES MELLITUS  
.....

MEDICAL HISTORY  
.....

HAS THERE BEEN WEIGHT CHANGE SINCE LAST EXAMINATION:      Yes

Cancel      Addend & Co-Sign This Document      Co-Sign This Document

The “My Uncosigned TIU Documents Utility” can be accessed either through the Alert Resolution window at logon or through the drop down menu under Tools in the CAPRI menu bar. This utility will display all templates that are in an Uncosigned status and where the user was chosen as the expected cosigner. The user will have the ability to either addend and cosign or just cosign the template. If adding an addendum, the co-signer’s comment will be attached to the original CPRS document and will be brought over to AMIE as an addendum to the final report. The original text will not be able to be modified.

Non-C&P type documents requiring co-signature cannot be signed from this screen and should be resolved directly in CPRS.



## **Additional Information**

Periodic updates to this document may be necessary as CAPRI CPWM functionality progresses. The latest copy of this document can be found out on the Vista Document Library:

<http://www.va.gov/vdl>.

### ***On-line Training***

Training material and links to additional resources can be found on the National Training and Education Office's website for the CAPRI CPWM project:

<http://vaww.vistau.med.va.gov/vistau/capri/default.htm>.